GUIDE TO SEARCHING THE DLSLAW LIBRARY

<u>LIBRARY CONTENT</u> – You are able to search for current DLS legal guidance issued as the following product types:

- Informational Guideline Releases (IGR)
- Local Finance Opinions (LFO)
- Bulletins (BUL)

SEARCH SCREEN – The search screen is shown below. If you select a particular Product Type, the following additional fields with dropdown menus are also available to use in the search.

- IGRs & LFOs Topics and Sub-topics
- Bulletins Type



HOW TO SEARCH THE DLSLAW LIBRARY

Searching by Product Number: Using Character Substitution

The percent (%) symbol can be used as a "wild card" or substitute for "all remaining characters" or "unknown characters" when searching by Product Number.

This feature is useful for finding products of a specific type that were issued in a specific year. For example, typing "IGR-2016%" in the Product Number search field will return results for all Informational Guideline Releases with product numbers beginning with IGR-2016.

Example: IGR-2016%

Select	Action	Create Date ♦	Product Type 🛊	Product Number	Record	Title \$
	Open	5/31/2017	IGR	IGR-2016- <u>403</u>	683	Fiscal Year 2017 Guidelines for Determining Annual Levy Limit Increase for Tax Base Growth
	Open	5/31/2017	IGR	IGR-2016- <u>203</u>	676	Fiscal Year 2017 Tax Bills - Semi-annual Payment System - Annual Preliminary Bills
	Open	5/31/2017	IGR	IGR-2016- <u>202</u>	675	Fiscal Year 2017 Tax Bills - Semi-annual Payment System - Annual Preliminary Bills
	Open	5/31/2017	IGR	IGR-2016- <u>201</u>	674	Fiscal Year 2017 Tax Bills - Semi-annual Payment System
	Open	5/31/2017	IGR	IGR-2015- <u>402</u>	670	Fiscal Year 2016 Guidelines for Determining Annual Levy Limit Increase for Tax Base Growth

The percent sign takes the place of all characters that might appear after "IGR-2016", like "-403" or "-203". This search would return results for all the 2016 IGRs. Searching for Product Number "BUL-2017%" would return results for all 2017 Bulletins.

Text-based Searches: Using a Single Word

The % sign can also be used in text-based search fields like Title, Keywords and Summary, but it's not necessary. Text-based searches automatically include related words unless they're specifically excluded.

Entering a single word in any of the text-based Search fields will give you results containing that word. You will also see results that contain additional words that contain the word you typed.

Examples:

- "Assessment" will return results containing assessment, assessments
- "Bill" will return results containing bill, bills, billing
- "Part" will return results containing department, departmental, part, partner, participate

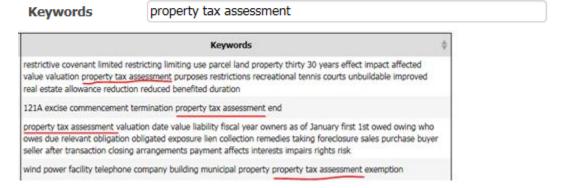
Title	part	
IGR-1992-101	534	Revolving Funds for Departmental Programs
BUL-2017-01B	468	Authorization of Departmental Revolving Funds and Model By- law/Ordinance
BUL-2003-19B	333	Deferral of Part of Pension Costs in FY04 and FY05
BUL-1994-09B	120	Control of Overspending by Departments
BUL-1986-11B	249	Invitation to Participate in Computer Assisted Mass Appraisal and Tax Administration System

Text-based Searches: Combining Words

Combining words in a text search can produce varied results; Gateway considers <u>how</u> the words are combined – not just the words themselves.

Example 1: multiple words

When multiple words are entered in a text box, Gateway will produce only the results containing the entire phrase, with all words appearing in that exact order. For example, if the words "property tax assessment" are entered in the Keyword text box, results will contain all three words in that exact order.



Products containing all three words *not* in that exact order ("tax property assessment") will *not* appear in the results.

Example 2: multiple words using [and]

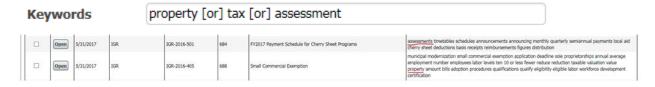
To see results containing multiple words where all the words appear, but in any order, separate the words using [and]. "And" can be in upper or lower case, but it must be surrounded by brackets []. The words used in the search can also be part of another word; for example, a search for "tax [and] assessment" would also return results containing the words "taxation" and "assessments."



Select	Action	Create Date 🛊	Product Type 🌲	Product Number	Record Number	Title \$	Keywords \$
	Open	5/31/2017	IGR	IGR-2016- 404	687	Fiscal Year 2017 Guidelines for Annual Assessment and Allocation of Tax Levy	municipal modernization triennial public hearing procedures process determine determination levy percentage among classes industrial commercial usage use classification minimum factor real property taxation burden share apportion change assessing reassess certify certified certification full fair cash value valuation triennial appraisal sales ratios market increases total revaluation shift residential exemption ceiling maximum threshold redistribute redistribution reallocate reallocation up to tax rates approval setting interim adjustments standards reassessment open space discount small commercial exemption

Example 3: multiple words using [or]

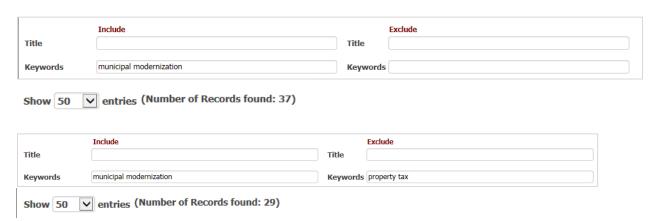
Combining multiple words using [or] will return the largest number of results. This type of search returns products containing <u>any</u> of the words; if eight words are entered with [or] between each word, Gateway will return a result if even one of the words is contained in a product.



Include versus Exclude

When words are entered in both the Include and Exclude columns, Gateway will identify results for all terms entered under Include, then it will discard the results containing anything it finds under Exclude.

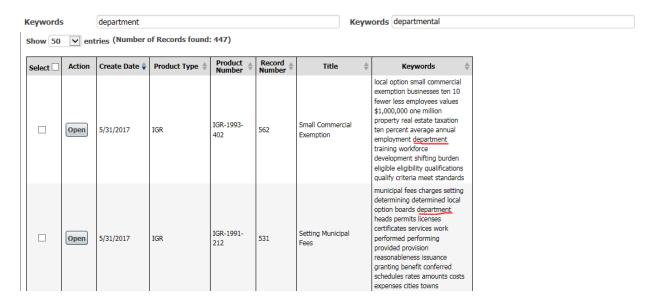
Example: Searching for keyword phrase "municipal modernization" returns 37 results. Adding the words "property tax" in the Exclude column removes 8 of the original results.



Because the Search code relies on logic that includes similar words, it is difficult to exclude the variations, but it's not impossible.

Example: Include "department", Exclude "departmental"

Using "department" as a keyword would also return results including "departmental." Typing "departmental" as an Excluded keyword will discard the extra results, and will return only results containing "department."



Searches Using Statutes

The Statutes text box can be used to search for products associated with chapters and sections of either Massachusetts General Laws or the Acts of a certain year.

For General Laws, use this format: chapter:section[clause/subsection]

Separate the chapter number and section number with a colon (:) and if using a clause or subsection, surround it with brackets.

Example: 59:5[3]

Entering "59:5[3]" in Statues will return results associated with Massachusetts General Law Chapter 59 Section 5, clause 3.

For Acts use this format: acts year chapter:section

Enter the word "acts" followed by a space, the 4-digit year, a space, and the chapter and section separated by a colon (:).

Example: acts 2016 218:91

Entering "acts 2016 218:91" in Statutes will return results associated with the Acts of 2016, Chapter 218 Section 91.

Searches using Cases

The Cases text box can be used to search for products associated with court cases or Appellate Tax Board findings of fact and reports. You can search by entering all or part of a case name or citation as in these examples:

Supreme Judicial Court case – Enter all or part of: Shrine Of Our Lady Of LaSalette, Inc. v. Board of Assessors of Attleboro, 476 Mass. 690

Appeals Court case – Enter all or part of: R.I. Seekonk Holdings, LLC v. Board of Assessors of Seekonk, 91 Mass. App. Ct. 1104

Appellate Tax Board findings and reports – Enter all or part of: KTT, LLC v. Board of Assessors of Swansea, 2016 ATB 426

Searches Using "From" and "To" Last Action Dates

"Last Action Date" will typically be the date the product was released to the public. Before Gateway Modernization in June 2017, however, the legal module did not capture process dates, limiting the usefulness of date searches for legacy products. Post-Gateway Modernization, DLS's Municipal Finance Law Bureau will be marking many of their existing legal products for public release, so in the future searching by date will be useful for finding Bulletins, IGRs and LFOs released within a "From" and "To" date range.